Collecting Your Due:
Fines, Fees, and Invoicing

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EVERGREEN INDIANA
OPEN SOURCE INTEGRATED LIBRARY SYSTEM

Basic Principle: Quarters versus Dollars

Overdue Fines

- Accrue 25 cents a day; one day grace period

- Owed to the circulating library, not the owning library
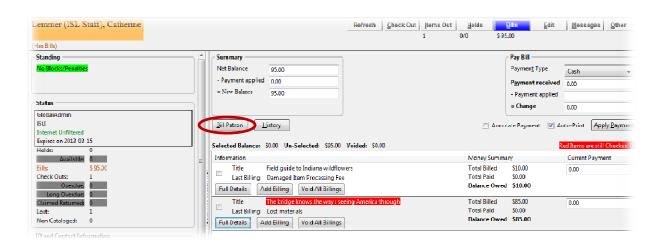
- What is the circulating library?

Lost, Damaged &related charges

- Owed to owning library

- Declared lost at 45 days overdue

- Marking item lost stops overdue fees from accruing
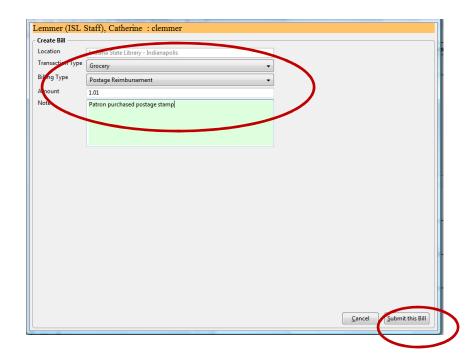
- Default Price

- $10 processing fee

- Collection fee

Simple Billing

- Billing a Patron Account

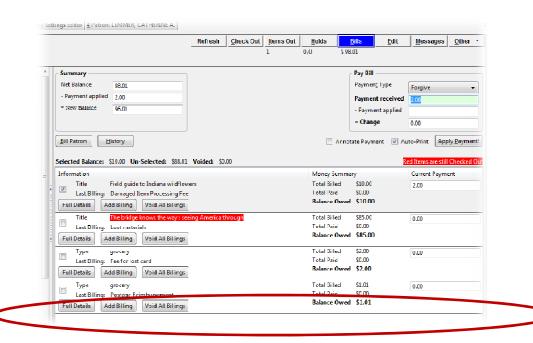- Retrieve patron account; select Bills

- Click "Bill Patron"

Simple Billing

- Select option from drop down menu
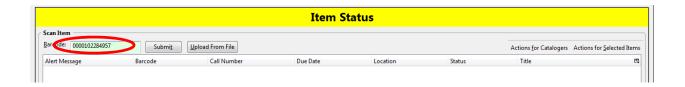- Add billing type, amount, note
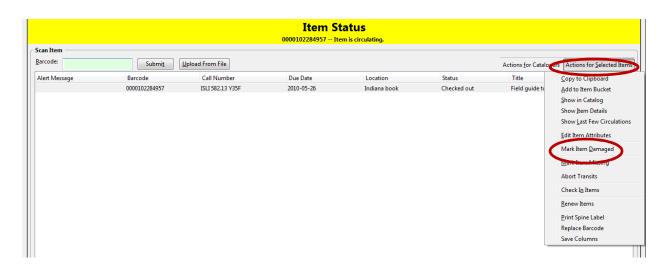- Click "Submit this Bill"
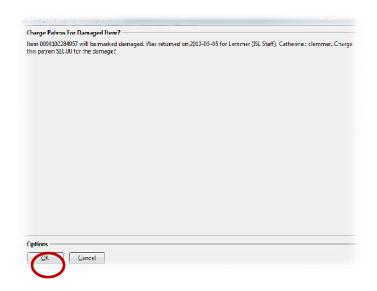
Simple Billing

- Confirm patron account updated

Damaged: How to Bill

- Step One: Enter Item Barcode on Item Status Screen (F5)

Damaged: How to Bill

- Step Two:
  - Click "Actions for Selected Items"
  - Select "Mark Item Damaged"

Damaged: How to Bill

- Step Three: Authorize the Billing

Damaged: How to Bill

- Step Four: Check the Patron's Account
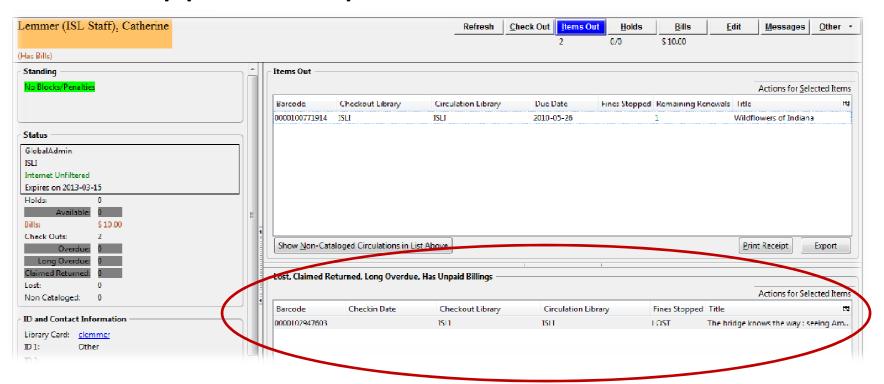
Lost: How to Bill

- Step One: Retrieve "Items Out" on Patron Screen

Lost: How to Bill

- Step Two:
  - Click "Actions for Selected Items"
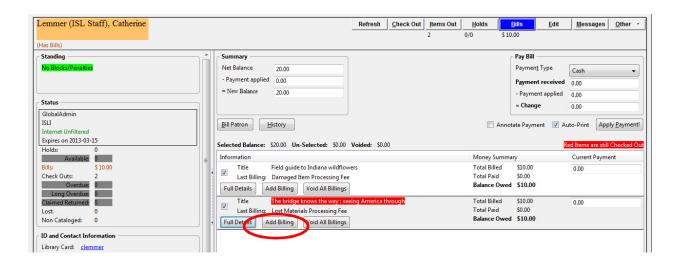 - Select "Mark Lost (by Patron)"

Lost: How to Bill

- Item appears on patron's record

Lost: How to Bill

- Step Three: Confirm patron account billing

Lost: How to Bill

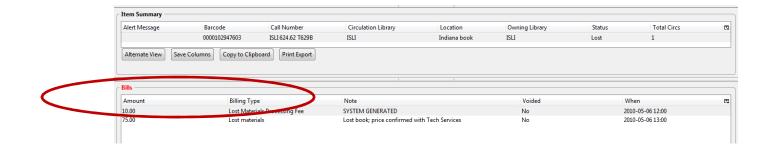- Step One: No Default Price - Add Billing

Lost: How to Bill

- ## Step Two: No Default Price - Add Billing
  - ### Select billing type from drop down
  - ### Fill in Price, Notes & Click "Submit This Bill"

Lost: How to Bill

- ## Step Three: No Default Price - Add Billing
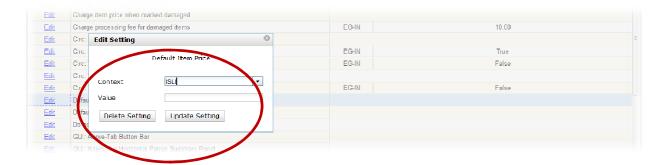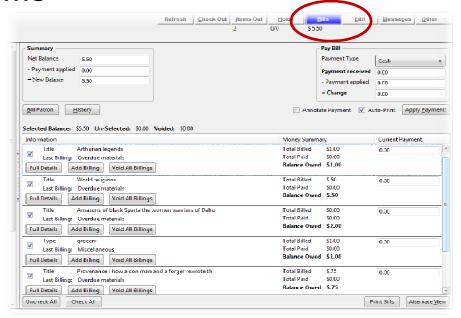 - ## Confirm Billing On Patron Account

Lost Item: How to Bill

- Set the default price

- Admin>Local Administration>Library Settings

- Click Edit

- Fill in a price (value), Click Update Settings

What's Mine; What's Yours?

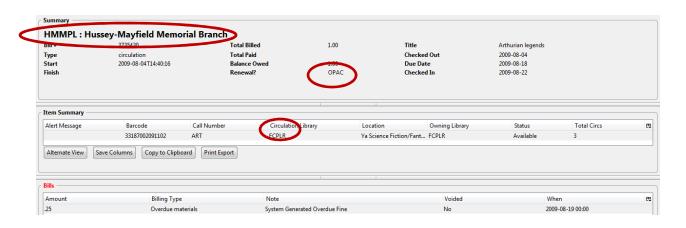- Step One

- Retrieve the Patron Account

- Select Bills
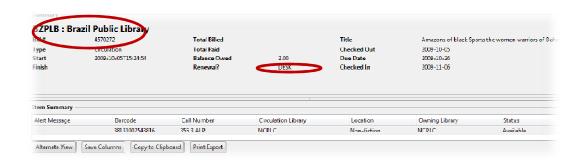
What's Mine; What's Yours?

Example

Item Checked out at Fulton County

Renewed via OPAC or from Patron's Home Computer, fines owed to Hussey-Mayfield

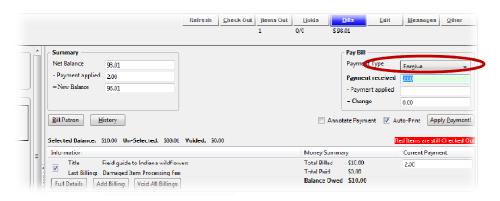# What's Mine; What's Yours?

Another Example

   Item Checked out at Noble County
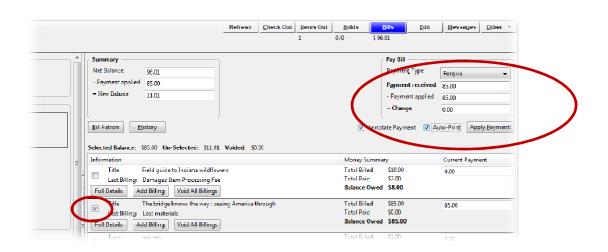
   Renewed at Brazil, fines owed to Brazil

Recording the Payment

- Never use "void"

- Use "forgive" or "waive"

- May only "forgive" or "waive" fees owed to our library

Recording the Payment

- Example: Patron returns item marked "lost"

Recording the Payment

- Retrieve patron account; select Bills
- **Forgive** the cost of the lost item and processing fee
- DO NOT Void

Recording the Payment

- Resolving the bill removes the item from patron's account

Future Options

- Constrained by current law until July 1
- Future Payment Options
  - Collect any amount due
  - Centralized reconciliation report run
  - Importance of default prices and updating replacement costs for items marked lost and/or 45 days overdue

Print and Email Notices

- Email Notices
  - 3 day pre due date
  - Date due

- Print Notices
  - 14 days
  - 28 days
  - 45 days

- URL – Print notices

https://evergreen.lib.in.us/notices/xxxx/index.html

- URL – Print notices tutorial

http://www.in.gov/library/files/How_to_Access_Library_Overdue_Print_Notices.pdf

Questions?